

Claims

WHAT IS CLAIMED IS:

1503 61> 1. A method of implementing a collaborative management  
2 application, the method comprising:  
3 logging on to the collaborative management application;  
4 configuring an appearance of the collaborative management application:  
5 and  
6 viewing, adding, or modifying items of information pertaining to one or  
7 more clients;  
8 wherein said configuring further comprises:  
9 specifying identifying information for a client;  
10 specifying information for at least one matter of the client;  
11 selecting a component in connection with all matters of the client;  
12  
13 specifying at least one category for the component;  
14 identifying a user group for the client, the user group comprising  
15 a set of users having some level of authorization with respect to matters of the  
16 client;  
17 wherein said viewing, adding, or modifying further comprises:  
18 selecting a client;  
19 selecting one or more matters in connection with the selected  
20 client, wherein the one or more matters comprise a group of matters;  
21 selecting a component in connection with the selected group of  
22 matters;  
23 selecting a filter for filtering items for the selected client, matters  
24 and component;  
25 displaying the filtered items to a user;

26 selecting a user;  
27 displaying only items for which the selected user has been  
28 designated; and  
29 wherein said configuring and said viewing, adding, or modifying are  
30 performed via an Internet web site.

1506 C27 2. The method of claim 1 further comprising:  
2 adding an item to a component; and  
3 specifying a status of said added item.

1 3. The method of claim 2 further comprising changing a status of  
2 said added item.

1 4. The method of claim 3 wherein said changing a status of said  
2 added item comprises selecting an icon associated with said item status.

1 5. The method of claim 2 further comprising:  
2 selecting an item status; and  
3 displaying only items having a status corresponding to the selected item  
4 status.

1 6. The method of claim 1 wherein the component is selected from a  
2 group consisting of a status component, an outside service provider notes  
3 component, a client notes component, a checklist component, and a critical  
4 dates component and wherein only users identified as outside service provider  
5 users can modify outside service provider notes items and only users identified  
6 as client users can modify client notes items.

1        7.     The method of claim 1 wherein said configuring further  
2 comprises assigning an authorization level to each user of the user group.

1           8.     The method of claim 7 wherein said configuring further  
2 comprises modifying the authorization level of a user of the user group in  
3 connection with at least one matter of the client.

1           9.     The method of claim 1 wherein the Internet web site is  
2 maintained by a party selected from the group consisting of the client and an  
3 outside service provider of the client.

1           10.    The method of claim 1 wherein the filter corresponds to a time  
2 period and wherein the filtered items comprise items edited during the time  
3 period corresponding to the filter.

1           11.    The method of claim 10 wherein the filtered items comprise all  
2 items added to the component since the items were last viewed.

1           12.    The method of claim 2 wherein the item status is selected from a  
2 group consisting of hot issue, in progress, and done.

1           13.    The method of claim 1 further comprising:  
2 adding an item to a component.  
3 designating a user in connection with the added item; and  
4 responsive to said designating, automatically generating an E-mail to  
5 the designated user in connection with the item to provide the designated user  
6 with information in connection with the added item.

**PATENT**

1           14. The method of claim 1 further comprising:  
2           responsive to user selection of an E-mail icon associated with one of the  
3           displayed items, displaying at least one E-mail group for the selected client, the  
4           at least one E-mail group comprising a list of users for receiving E-mail  
5           messages regarding the selected client and from which the user can select  
6           users to receive an E-mail message in connection with the associated item; and  
7           sending the E-mail message to the selected users.  
8           wherein the collaborative management application automatically filling  
9           in a subject field of the E-mail message with a description of the associated  
10          item.

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